

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT ID CODE <div style="text-align: center;">J</div>		PAGE OF PAGES <div style="text-align: center;">1      21</div>	
2. AMENDMENT/MODIFICATION NO. <div style="text-align: center;">0001</div>		3. EFFECTIVE DATE <div style="text-align: center;">18-Nov-2003</div>		4. REQUISITION/PURCHASE REQ. NO.		5. PROJECT NO.(If applicable)	
6. ISSUED BY <div style="text-align: center;">CODE</div> CENTER FOR HEALTH CARE CONTRACTING MEDCOM HEALTH CARE ACQ ACTY ATTN MCAA C BLDG 4197 2107 17TH ST SUITE 68 FORT SAM HOUSTON TX 78234-5068		7. ADMINISTERED BY (If other than item 6) <div style="text-align: center;">CODE</div> <div style="text-align: center; font-weight: bold;">See Item 6</div>					
8. NAME AND ADDRESS OF CONTRACTOR (No., Street, County, State and Zip Code)				X		9A. AMENDMENT OF SOLICITATION NO. DADA10-03-R-0039	
				X		9B. DATED (SEE ITEM 11) 31-Oct-2003	
						10A. MOD. OF CONTRACT/ORDER NO.	
						10B. DATED (SEE ITEM 13)	
CODE		FACILITY CODE					
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS							
<input checked="" type="checkbox"/> The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offer <div style="float: right;"> <input type="checkbox"/> is extended,      <input checked="" type="checkbox"/> is not extended.         </div> <p>Offer must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended by one of the following methods:          (a) By completing Items 8 and 15, and returning <u>1</u> copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted;          or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE          RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN          REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter,          provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.</p>							
12. ACCOUNTING AND APPROPRIATION DATA (If required)							
13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.							
A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.							
B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(B).							
C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:							
D. OTHER (Specify type of modification and authority)							
E. IMPORTANT: Contractor <input type="checkbox"/> is not, <input type="checkbox"/> is required to sign this document and return _____ copies to the issuing office.							
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) SEE ATTACHED SHEET SECTION SF 30 - BLOCK 14 CONTINUATION PAGE							
Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.							
15A. NAME AND TITLE OF SIGNER (Type or print)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)			
				TEL: _____ EMAIL: _____			
15B. CONTRACTOR/OFFEROR  _____ (Signature of person authorized to sign)		15C. DATE SIGNED		16B. UNITED STATES OF AMERICA  BY _____ (Signature of Contracting Officer)		16C. DATE SIGNED  18-Nov-2003	

## SECTION SF 30 BLOCK 14 CONTINUATION PAGE

**SUMMARY OF CHANGES**

## SECTION SF 30 - BLOCK 14 CONTINUATION PAGE

The following have been added by full text:

AMENDMENT 0001

PURPOSE: To remove the separate requirement for Task Order # 3, Fort Lee, in its entirety and incorporate it into requirement for Tidewater Task Order #6 and administrative changes to solicitation.

1. Under Addendum to 52.212-1 (b) - Change all references FROM: Task Orders 1-7 TO: Task Orders 1-7 (TO #3 for Fort Lee is Deleted).
2. Under Addendum to 52.212-1 (b) II INFORMATION B. (page 51 of 75) Change FROM: 40 pages TO: 75 pages and Change FROM: 40-page TO: 75-page.
3. Under Addendum to 52.212-1 (b) III INSTRUCTIONS AND PREPARATION OF PROPOSAL B. 1. Part I – Administrative b. Request for Proposal (52 of 75) – Change FROM: on pages 13 through 33 TO: on pages 2 through 20.
4. Under Addendum to 52.212-1 (b) - 5. PART V: Task Orders (Factor E and Factor D) b. (Page 56 of 75)  
**DELETE:**  
Task Order 3      Fort Lee, VA      LEE
5. Under Addendum to 52.212-1 (m) (page 61 of 75) Delete the following Attachments:
 

Task Order 3 = Lee	LEE PWS <b>DELETED</b>
Target Architecture for MTF LANs	LEE Attachment 1.pdf <b>DELETED</b>
Sample Appointing Criteria and Business Rules	LEE Attachment 2.doc <b>DELETED</b>
Sample Training Topics and Hours	LEE Attachment 3.doc <b>DELETED</b>
CHCS Confidentiality and Password Protocol Statement	LEE Attachment 4.doc <b>DELETED</b>
Historical Specialty Appointment Call Volumes	LEE Attachment 5.doc <b>DELETED</b>
LEE Wage Determination	LEE Attachment 6.doc <b>DELETED</b>
CLIN Pricing for LEE	LEE Attachment 7.doc <b>DELETED</b>
LEE Equivalent Rates	LEE Attachment 8.doc <b>DELETED</b>
6. Under Addendum to 52.212 –1 (m) (pages 61-62 of 75) Delete the following Attachments:
 

Task Order 6 = Tidewater	TIDEWATER PWS.doc <b>DELETED</b>
Sample Appointing Criteria and Business Rules	TIDEWATER Attachment 1.doc
	<b>DUPLICATE COPY DELETED</b>
Training Topics and Hours	TIDEWATER Attachment 2.doc <b>DELETED</b>
Historical Specialty Appointment Call Volumes	TIDEWATER Attachment 4.doc <b>DELETED</b>
7. Under Addendum to 52.212 –1 (m) (pages 61-62 of 75) Replace the following Attachments:
 

Task Order 6 = Tidewater	TIDEWATER PWS1.doc
Training Topics and Hours	TIDEWATER Attachment 2a.doc
Historical Specialty Appointment Call Volumes	TIDEWATER Attachment 4a.doc

8. Under Addendum to 52.212-2 (a) 7. (page 63 of 75) Change all references FROM: Task Orders 1-7 TO: Task Orders 1-7 (TO #3 for Fort Lee is Deleted).

## SECTION SF 1449 - CONTINUATION SHEET

The following have been modified:

### ADDENDUM 212-1 INSTR.

## **ADDENDUM TO 52.212-1 INSTRUCTIONS TO OFFERORS-COMMERICAL ITEMS (JUL 2003)**

Paragraph 52.212-1(a). The NAICS code is 561110. Delete the SIC code of 8741 from Block 10 of the SF 1449. The small business size is \$6 million.

Paragraph 52.212-1(b). Replace Submission of Offers with the following:

### I. GENERAL.

A. The solicitation will be announced and attachments posted through Army Single Face to Industry and the FedBizOpps websites.

B. Contract POCs: The Contracting Officer and Contract Specialists are the sole points of contact for this procurement. Questions or concerns are to be submitted electronically to Contract Specialists, Ms. Jelen at [cynthia.jelen@us.army.mil](mailto:cynthia.jelen@us.army.mil) and CPT Davis [willie.davis5@us.army.mil](mailto:willie.davis5@us.army.mil)

### C. NOTICE TO PROSPECTIVE OFFERORS OF PREPROPOSAL CONFERENCE

A PreProposal conference will be held on November 13, 2003 at 9:00 a.m. (CST) at Fort Sam Houston, TX.

Offerors are requested to review the solicitation and to submit any questions, in writing, by 4:00 PM (CST), 6 Nov 03, to Ms. Cynthia Jelen, E-mail [cynthia.jelen@us.army.mil](mailto:cynthia.jelen@us.army.mil), (210) 295-4357 and CPT Willie E. Davis [willie.davis5@us.army.mil](mailto:willie.davis5@us.army.mil) or mail to MEDCOM Center for Health Care Contracting, Attn: Cynthia Jelen, Bldg 4197, 2107 17th Street, Suite 68, Fort Sam Houston, TX 78234-5068; or facsimile (210) 295-4378.

D. Site visits for the Task Orders. Attendance is at the sole expense of potential offerors. **Site visits are not mandatory, but highly encouraged. Offerors MUST propose on ALL CLINS for ALL the Tasks Orders.** See CLIN attachments to each task order. Site Visits are scheduled for the following:

Location	Date	Timeframe
1. Fort Bragg & Pope AFB NC	21 Nov 03	8:00 am to 3:00 pm EST
2. Naval Hospital Great Lakes, IL	2 Dec 03	1:00 pm to 4:00 pm CST

- |                                    |           |                         |
|------------------------------------|-----------|-------------------------|
| 3. Tidewater Area (Portsmouth, VA) | 24 Nov 03 | 8:00 am to 11:00 am EST |
| 4. McChord AFB, WA                 | 18 Nov 03 | 8:00 am to 11:00 am PST |
| 5. Wright Patterson AFB, OH        | 3 Dec 03  | 1:00 to 4:00 pm EST     |

#### E. Registration for PreProposal Conference and Site Visits

1. A PreProposal conference will be held on 13 Nov 03, from 9 to 11 am (CST) at Fort Sam Houston, TX. Offerors planning to attend the PreProposal conference are requested to notify Ms. Jelen and CPT Davis **NO LATER THAN** 6 Nov 03, 4:00 PM (CST).

2. Interested offerors must notify your intent to attend any of the site visits a minimum of FIVE (5) calendar days by 4 pm (CST) before the scheduled event.

3. Each offeror shall be limited to two representatives per PreProposal conference or site visit. The name of your Company, name of two representatives, and Company telephone numbers shall be identified at the time of notification of intent to attend the PreProposal conference or site visits. Send your intent in writing to Ms. Cynthia Jelen, E-mail [cynthia.jelen@us.army.mil](mailto:cynthia.jelen@us.army.mil) and CPT Willie E. Davis [willie.davis5@us.army.mil](mailto:willie.davis5@us.army.mil) or facsimile (210) 295-4378. Confirmation to include site location, instructions, and agenda will be provided once your request is received and acknowledged.

## II. INFORMATION.

### A. Format:

1. CD Format. The proposals are to be in electronic format, on CD-R, compatible with Microsoft Office 2000 applications. Oral presentation slides are to be in the same format. Each CD-R shall be made read only and "burned" at a minimum 8x speed. In addition, each CD-R must be made "final". "Final" is a recording option that renders the CD totally used so that no other data tracks can be added. Do not use compressed file formats. Documents such as annual reports, previously printed materials; graphics or any other documents that cannot be submitted in electronic format are exempt.

a. In the top right corner of each page of the document within the CD-R, the offeror shall include the offeror's company name; the offeror's Commercial and Government Entity (CAGE) Code number; the solicitation number; and date proposal submitted. On the top right corner of each page also identify as the price-proposal, technical proposal, past performance information, financial capability, or subcontracting plan. Submissions shall be virus free.

b. Separate copies of CD-R's per topic are acceptable, or the offeror may include the following files on one CD-R: past performance information, financial information, and subcontracting plan. The price proposal and technical capabilities must be on separate CD-Rs for the purpose of independent evaluation. Additionally, all information related to pricing shall be included in the section of the proposal and defined as pricing data. This volume will stand alone in supporting the offeror's approach to reasonableness and completeness of the overall price of this effort. UNDER NO CIRCUMSTANCES should pricing data be included elsewhere in the proposal.

c. Create a document or list of all of the electronic files the offeror is submitting and cross-reference the list to the offeror's proposal, i.e., XXXPrice.xls = Company X Pricing or XXXIS02 = Company X Income Statement 2002.

### 2. Paper copies.

a. Provide five (5) hardcopies of any materials requested or submitted for this solicitation, unless otherwise noted.

b. All proposal pages shall be appropriately numbered in the bottom right hand corner.

3. If there are discrepancies between the paper and electronic versions we will defer to the paper copy.

B. Proposals must include the following: Typed pages should be no smaller than 10 font, single-spaced, on plain white paper, with a maximum of **75** pages. The following is excluded from the **75**-page count: all of Part I, Part II [to include attachments of Past Performance Evaluation References (PPER), Past Performance Evaluation Questionnaires (PPEQ)], all of Part III and only Factor E (Pricing) of Part V.

### III. INSTRUCTIONS FOR PREPARATION OF THE PROPOSAL.

A. The proposal is divided into written and oral sections as follows:

1. WRITTEN consists of:

Part I: Administrative

Part II: Present/Past Performance - FACTOR A

Part III: Subcontracting Plan – FACTOR B

Part IV: Technical Capabilities – FACTOR D

Quality Control Plan – SUB FACTOR D1

Continuity of Service Plan – SUB FACTOR D2

Part V: Task Order – FACTOR E and FACTOR D

Pricing – FACTOR E Task Orders 1-7 **(TO # 3 for Fort Lee is Deleted)**

Technical Capabilities – FACTOR D

Transition Plan – SUB FACTOR D3 – Task Orders 1-7 **(TO # 3 for Fort Lee is Deleted)**

IM/IT and Telephony Plan – SUB FACTOR D4 – Task Orders 1-7 **(TO # 3 for Fort Lee is Deleted)**

2. ORAL consists of:

Part I: Experience: - FACTOR C

Management Approach - SUB FACTOR C1

Geographic Capabilities - SUB FACTOR C2

Scope of appointing services (centralized and/or decentralized) - SUB FACTOR C3

Part II: Technical Capabilities - FACTOR D

Staffing Plan – SUB FACTOR D5

Customer Service and Satisfaction of Appointing Services Plan – SUB FACTOR D6

3. The written proposal is described first with Administrative and Factors and sub factors A, B, D (D1, D2, D3, and D4), and E. The oral proposal follows afterwards under “Solicitation (Oral Presentations)” encompassing Factors and sub factors for C (C1, C2, and C3) and D (D5 and D6).

B. Written proposals shall be prepared in five separate parts (Part I, II, III, IV, and V) and stapled or bound separately (the use of notebooks, binders, and folders is discouraged) and submitted as follows:

Part I: Administrative

Part II: Present/Past Performance - FACTOR A

Part III: Subcontracting Plan – FACTOR B

Part IV: Technical Capabilities: FACTOR D

Quality Control Plan – SUB FACTOR D1

Continuity of Service Plan – SUB FACTOR D2

Part V: Task Orders – FACTOR E & FACTOR D

Pricing – FACTOR E Task Orders 1-7 **(TO # 3 for Fort Lee is Deleted)**

Technical Capabilities – FACTOR D

Transition Plan –SUB FACTOR D3  
IM/IT and Telephony Plan – SUB FACTOR D4

**1. PART I – ADMINISTRATIVE**

a. The proposal shall have a maximum 2-page Cover Letter and Introduction identifying the offeror (name, address, telephone and fax numbers, electronic mail address, the solicitation number, and the contents of the proposal). The offeror shall provide the names, titles, telephone numbers, and electronic mail address of all persons authorized to negotiate with the government in connection with this requirement. Outline of the proposal shall be identified by sequential page number and by Part reference number/title.

b. Request for Proposal - Solicitation/Contract/Order for Commercial Items, Standard Form (SF)1449, and Amendments, SF 30. One copy of page 1, SF 1449, Block 30A, and any amendments SF 30, Block 15B, with **ORIGINAL SIGNATURE** of a corporate officer authorized to negotiate for the company. Do not price Contract Line Item Numbers on pages 2 through 20. See Part V. a. Task Order Pricing.

c. Representations and Certifications: One completed, original copy of FAR 52.212-3, Alt I, Offeror Representations and Certifications – Commercial Items, DFARS 252.212-7000, and FAR 52.227-15, Statement of Limited Rights Data and Restricted Computer Software with **ORIGINAL SIGNATURE** of a corporate officer authorized to negotiate for the company.

d. Offerors shall submit proposals to the office indicated in Block 9 of Standard Form (SF) 1449, Solicitation/Contract/Order for Commercial Items, to arrive no later than the date and time specified in Block 8, SF 1449.

**e. Financial Capability**

(1) Offerors shall provide their most recent financial statements for the last three years, and year-to-date financial information through the last quarter available. If audited, reviewed, compiled or certified financial statements are available, these shall be submitted. Financial capability information shall be submitted with the company name intact. Data provided will be protected in accordance with FAR 3.104 as source selection information and will be evaluated separately from technical information. If the offeror plans to rely on financial support from other sources, identify the maximum lines of credit that will be available. Include documentation to support the line of credit amounts and a point of contact and phone number for the lender.

(2) The above information shall be provided for the prime and all proposed subcontractors, teaming arrangements, partnerships, and joint ventures performing more than 25% of the proposed contract effort. If the offeror is a combination of firms, for example, a teaming arrangement for partnership or joint venture, discuss the financial responsibilities among the companies. Historical and year-to-date financial data shall be submitted for each company that makes up the offeror, and the ability to fund contract performance shall be addressed for the combined firm.

**2. PART II. PRESENT/PAST PERFORMANCE. (FACTOR A)**

a. Offeror shall provide an Executive Summary of Present/Past Performance. An Executive Summary shall be placed in the preface of the volume. The Executive Summary, limited to two pages shall provide a corporate overview of the offeror's past and present performance information.

b. A statement of offeror's present and past performance as a company in providing patient appointing services, especially those services to institutions of similar size and scope covered by this solicitation. Provide a list

of all contracts and subcontracts similar in nature (size and complexity) to the acquisition, awarded or performed during the past three (3) years. Contracts listed should include those entered into with the Federal Government, state and local governments and commercial customers. The information shall include contract numbers, contract award dates, contract types and total prices. The description must include the following for the previous 3 years:

(1) A narrative description of each contract listed and why the offeror considers it similar to the effort required by this solicitation.

(2) For each contract listed, provide the points of contact names, current telephone and fax numbers, and Electronic mail addresses (i.e., customer's technical representative, customer's contract administration activity, and the administrative contracting officer).

(3) Description of any corrective actions taken by the offeror to resolve any problems.

(4) Information on all contracts that have been terminated, in whole or in part, for cause or default during the past 3 years, including those currently in the process of termination. The offeror may provide information on problems encountered on the contracts/subcontracts identified.

c. The offeror must submit with its proposal, Past Performance Evaluation References, **PPER Attachment**, to this solicitation for each reference cited. Offerors shall ensure the accuracy of references provided. The government will not be responsible for tracking incorrect references and phone numbers or those not submitted by the closing date. Providing incorrect references and phone numbers may render the offeror's proposal unsatisfactory. Offerors are reminded that while the government may elect to consider data obtained from other sources, the burden of providing thorough and complete performance information rests with the offeror.

(1) It is the offerors responsibility to have the past performance record, Past Performance Questionnaires, **PPEQ Attachment** to this solicitation completed and signed by an official of the referenced client. The reports are to be completed by the most cognizant officer of the account. The signature must be current within 60 days of the proposal submission date. To expedite the evaluation process, offerors are requested to provide its references, PPEQ Attachment, to this solicitation with instructions to return the questionnaire to the address in block 9 of the SF1149 before the solicitation closing date. It is the offeror's responsibility to ensure the reference submits the PPEQ.

(2) Since the government may not necessarily interview all the sources provided by the offerors, it is incumbent upon the offeror to explain the relevance of data provided. The government does not assume the duty to search for data to cure deficiencies it finds in proposals. The burden of providing thorough and complete past performance information remains with the offerors to include current and correct telephone numbers, fax numbers, and Electronic mail addresses. Proposals that do not contain the information requested may render the offeror's proposal unsatisfactory.

(3) If the offeror does not have a past performance history in government requirements relating to the solicitation, or none of the magnitude set forth in this solicitation, then private sector contracts for similar services, which the offeror considers relevant, when compared with the services required by this solicitation, may be submitted. If no past performance history exists, then the offeror will not be rated favorable or unfavorable, and a neutral rating will be given for this factor.

d. Include past performance in complying with FAR clause 52.219-9 Alternate II Small Business Subcontracting Plan.

### 3. PART III - SUBCONTRACTING PLAN (FACTOR B)

a. It is the intention of the Government to ensure that small business concerns have the maximum practicable opportunity to participate in the performance of this contract. DoD requires that Small and Disadvantaged Business participation be a factor or sub factor in evaluating competitive proposals under solicitations that require a plan and meet other specified requirements (10 U.S.C. 2323(h)(2) and FAR 19.1202).

DFARS 215-304 establishes a source selection requirement to evaluate the extent of small business, small and disadvantaged business, woman owned small business and Historically Black Colleges and University/Minority Institutions (HCU/MI) participation.

b. If the offeror is other than small business, the offer shall submit a Subcontracting Plan or Commercial Individual Plan as part of its technical proposal, which after approval by the Contracting Officer and upon contract award will be incorporated into the contract as a compliance document serving as the basis of the offeror's subcontract management practices.

c. The offeror shall document clear, detailed, logical and realistic approaches in a Subcontracting Plan for establishment, oversight, and quality control of subcontracts which comply with FAR 19.702(a)(1) and (2) (Small Business Programs) and the Government's acquisition and contracting goals pertinent to this solicitation.

d. Current goals are:

Small Business (SB)	30% of total contract value
Small Disadvantaged Businesses (SDB)	5% of total subcontracting dollars
Woman-Owned Businesses (WOSB)	5% of total subcontracting dollars
HUBZone Small Businesses Concerns	3% of total subcontracting dollars
Service Disabled Veteran-owned Small Businesses	3% of total subcontracting dollars
Veteran-owned Small Businesses	3% of total subcontracting dollars

e. **SMALL BUSINESS OFFEROR: EACH SMALL BUSINESS OFFEROR SHALL LIST AND DESCRIBE ANY SUBCONTRACTS IT MAY USE TO PERFORM THE REQUIREMENTS OF THE PWS. IF NO SUBCONTRACTING IS PLANNED, THE OFFEROR SHALL STATE SO IN ITS PROPOSAL.**

#### **4. PART IV - TECHNICAL CAPABILITIES – FACTOR D**

Quality Control Plan – SUB FACTOR D1

Continuity of Service Plan – SUB FACTOR D2

a. Prior to being considered for award, an offeror shall fully demonstrate that it possesses the capabilities which the Government has determined essential to the reliable, efficient and timely accomplishment of the required services.

**NOTE 1:** Lack of any of these significant capabilities shall be considered sufficient cause for proposal to be determined unsatisfactory. THE TECHNICAL PROPOSAL SHALL PROVIDE SUFFICIENT DETAIL FOR THE GOVERNMENT TO DETERMINE WHETHER THE PROPOSAL SATISFACTORILY MEETS THE MINIMUM REQUIREMENTS OF THE SPECIFICATION. Statements that the offeror understands, can or will comply with all specifications, or statements paraphrasing the specifications of parts thereof, or phrases such as “standard procedures will be used” or “well-known techniques will be used”, will be considered insufficient. The technical proposal shall provide a narrative and supporting data with the following so that the evaluation sub factor listed below is included. The following information must be submitted as part of the technical proposal:

**NOTE 2:** Sub Factors D1 and D2 should address the overall contract as it reflects the offeror's corporate overview.

#### **b. Technical Capabilities – FACTOR D**

D1 (1) Quality Control Plan SUB FACTOR D1- Provide an overview of the offeror's quality control system for the offeror's operations. Explain the offeror's methodology for identifying, resolving, and preventing quality assurance problems. Discuss how the offeror's quality control plan will assure documentation, record maintenance, and reporting of quality related problems. Explain in detail how the offeror will meet the government's performance and quality requirements.

D2 (2) Continuity of Service Plan – SUB FACTOR D2 - Describe the offeror's plan to maintain service at acceptable performance levels and telephone standards IAW TRICARE regulations, i.e. *Commander's Guide to Access to Success*. Describe the offeror's methodology for supporting current, special, and emergency operations and for providing services for the Patient Appointment Services, PAS, with regard to mobilization, deployment, contingency, and wartime missions. Include a plan for "systems down" or when PAS is not operational. Provide the offeror's plans to respond in extreme weather conditions (tornado, flooding, snow, and ice). Provide the offeror's plans for contending with fire drills, tornado drills, or other scheduled safety and emergency-training exercises, which may necessitate interrupted services. Such interruptions will be considered when assessing Service Provider performance for the affected period.

## 5. PART V: Task Orders (Factor E and Factor D)

a. The task orders below are for proposal evaluation purposes with the government intending to award task orders, after award of the basic contract. Proposals from offerors **MUST** include pricing (Factor E) and technical capabilities (sub factors D3 and D4).

**NOTE 3:** Factor E and Sub factors D3 and D4 should address ALL task orders, i.e. Task Orders 1 through 7 (**TO # 3 for Fort Lee is Deleted**).

Offerors must submit pricing and technical capabilities (sub factors D3 and D4) for **ALL** tasks orders to be considered for award of a basic contract. The government intends to award these task orders after the basic contracts are awarded. **NOTE: Offerors must submit a price for ALL CLINs on ALL the Task Orders to be considered for award.** The following terms are acceptable, if applicable, for CLIN pricing: Not Separately Priced = NSP; or "0" = zero; or No Charge = N/C.

b. Provide the best prices to the government in terms of value. Offerors will need to price the Task Orders 1 through 7 (**TO # 3 for Fort Lee is Deleted**). The task orders are listed below and their Attachments are located at Army Single Face to Industry (ASFI) or FedBizOpps. A List of Attachments for the Task Orders is located at 52.212-1 (m).

Task Order	MTF Area	Acronym
Task Order 1	Fort Bragg, NC	BRAGG
Task Order 2	Pope AFB, NC	POPE
<del>Task Order 3</del>	<del>Fort Lee, VA</del>	<del>LEE DELETED</del>
Task Order 4	Naval Hospital Great Lakes, IL	NHGL
Task Order 5	Puget Sound, WA	PUGET
Task Order 6	Tidewater, VA	TIDEWATER
Task Order 7	Wright Patterson AFB, OH	WPAFB

## Factor E – Pricing

**NOTE 4:** All copies of the transition period and Telephony proposals shall contain the information listed below for the prime offeror and any subcontractors and shall be accurate, complete, and in sufficient detail for the government to substantiate price realism and reasonableness in accordance with FAR 15.403. The information may be submitted in the offeror's own format, but the format used must address the factors contained in this solicitation. Please note the Transition Period is FIRM-FIXED PRICE and the offeror shall separately furnish all pricing information relating to the transition period.

**NOTE 5: FAILURE TO PROVIDE ADEQUATE PRICING DATA MAY DELAY CONSIDERATION OF THE PROPOSAL OR MAY RESULT IN THE OFFEROR BEING DECLARED UNSATISFACTORY.**

(1) Price Breakdown. The offeror shall provide a separate breakdown of the prices proposed. This instruction is to assist the offeror in developing and presenting information required to support the price proposal.

(a) The offeror's price breakdown shall identify the contract line item number, CLIN, also identify any other proposed discount terms and conditions.

(b) Technical Pricing -Transition Plan and Telephony. The offeror shall provide a separate breakdown for the price proposed for the transition process for start-up time and also the Telephony.

(c) Indicate whether pricing is for the Base Year or Option Years.

b. Technical Capabilities – Provide written technical solution for the task order requirements and address the following two sub factors (D3 and D4).

**NOTE 6:** Sub Factors D3 and D4 should address ALL task orders, i.e. one per each Task Order for Task Orders 1 through 7 (**TO # 3 for Fort Lee is Deleted**).

(1) Transition Plan – SUB FACTOR D3 - The offeror shall describe how it proposes to execute all pre-performance activities, including but not limited to such activities as hiring and training of personnel, and acquisition and storage of supplies and equipment, etc., required to assume complete responsibility so that full service will be provided on the required performance date. Submit a chart, such as a milestone chart, showing sequenced events in the proposed transition plan. Provide a detailed implementation plan describing the strategy for providing timely, effective and complete start-up to demonstrate the offeror's ability to meet the requirements of the Performance Work Statement (PWS). Describe plans for acceleration in the event the contract award is not made in time to execute the offeror's original plan. Describe how the offeror plans to implement and communicate the transition from the incumbent i.e. managed care support contractors (incumbent) to the offeror.

(2) IM/IT and Telephony Plan – SUB FACTOR D4 - Describe the offeror's plan for implementing the Information Management/Information Technology requirements of each task order. Describe the offeror's plan for utilizing or installing telephony. Describe the offeror's plan how to interface to DoD's Composite Health Care System, CHCS. Provide a description and technical specifications of the telephony (software, switches, etc) the offeror is going to use. Describe why the offeror chose the methodology the offeror is presenting. Describe the IM/IT technical specifications (computers, software, etc) as well as a description, to include design or "wiring" diagrams, about how the IM/IT is going to work with the telephony systems. Describe why the offeror has chosen this route as the offeror's solution. Discuss in the plan the advantages and disadvantages of the offeror's IM/IT and Telephony Plan.

**C. Proposal: ORAL PRESENTATIONS**

1. All offerors are required to make an oral presentation and, if required, participate in a question and answer session conducted by the government. The purpose of the oral presentation is to assess the offeror's knowledge and understanding of the requirements, and to assess the offeror's capability to provide the required services. The oral presentation will be evaluated, but will not become a part of any resulting contract, unless the information is put in writing

2. Oral Presentation Scheduling. Each Offeror will be scheduled for an oral presentation after the closing date for submission of written proposals. Oral presentations will commence within 10 working days after closing day for receipt of proposals. Each offeror will be notified in writing of the assigned date, time, and specific location at Fort Sam Houston, TX for their oral presentation. The dates and times of the oral presentations will be assigned at random after the solicitation closing date. The government reserves the right to reschedule any offeror's oral presentation at its sole discretion. Rescheduling by the offerors will not be permitted after the schedule has been set.

The presentation location is available for inspection by the offerors prior to the time set for the actual presentation provided the offeror contacts the Contracting Officer requesting such.

3. Recording of Oral Presentation. The offeror may not audio or videotape its own presentation. The government may videotape each offeror's presentation and the question and answer session as a historical record. The offeror will not be provided a copy of the videotape.

4. Oral Presentation Constraints.

a. The offeror must identify the authors of the oral presentation as well as the individual(s) giving the oral presentation by name and association with the offeror.

b. Attendance at the oral presentation session is limited to no more than two of the offeror's key project personnel. Key project personnel are defined as those corporate individuals directly responsible for performance of this contract. Key project personnel must submit a resume as part of the proposal, prior to the closing date. These resumes must be submitted in a sealed envelope marked with the offeror's name, solicitation number, and marked, "Key Project Personnel Resumes". Include the names of the individual(s) designated to give the oral presentation.

c. In addition, up to two other company personnel, such as the CEO, company president, and/or legal representative, may attend the oral presentation. However, they will not be allowed to present except as part of a brief team/company introduction that will not be evaluated.

d. Only key project personnel will be allowed to give the oral presentation and answer clarification questions in the question and answer session. If necessary to provide the requested clarification, the designated personnel may confer briefly with other company representatives present during the oral presentation. The government does not intend to enter into discussions, but may conduct open communications to fully understand the offeror's technical presentation and/or written proposal.

e. Each offeror will be given two and one half (2 ½) hours to introduce key project personnel and discuss their corporate commitment to the contract requirements, and make its oral presentation. Tentative schedule: 8:00 – 9:00 Oral presentation for one hour; 9:00 – 9:10 break; 9:10 – 10:30 complete oral presentation; 10:30 to 11:00 break for the offerors and the government will caucus from 10:30 to 11:00. From 11:00 to noon - clarifications on material presented.

5. Oral Presentation Media Constraints. To ensure offerors do not spend an inordinate amount of time and money in preparing the presentation, the following constraints apply:

a. The contracting office will provide equipment for display of Microsoft PowerPoint slide presentations. PowerPoint presentations must be submitted on CD-R disk. Any other equipment needed by the offeror for their presentation must be provided by the offeror. The offeror must be able to set up such equipment (10 minutes), and this equipment will not interface with government networks.

b. There is no limit to the number of media that can be presented during the presentation. However, only those media submitted with the proposal and addressed in the presentation can be presented and considered for evaluation.

6. Submission of Media. Offerors must submit their oral presentation media plus paper copies of the presentation as part of their proposal by the solicitation closing date.

a. The media and the paper copies must be submitted in a sealed package labeled "oral presentation media" along with the offeror's name and solicitation number.

b. Offerors will not be allowed to change their media after submittal. Late submissions will be handled in accordance with FAR 52.212-1. The government will not open the sealed package. The sealed package will be given to the offeror to open at the time of the oral presentation.

7. Technical Quality (Oral Presentation). Format, content of presentation documentation and delivery will be left to the offeror's discretion. The oral presentation must specifically address the following factors and sub factors:

Part I : Experience: Factor C-

Management Approach – SUB FACTOR C1

Geographic Capabilities - SUB FACTOR C2

Scope of appointing services (centralized and/or decentralized) -SUB FACTOR C3

Part II: Technical Capabilities: Factor D

Staffing Plan – SUB FACTOR D5

Customer Service and Satisfaction of Appointing Services Plan – SUB FACTOR D6

**NOTE 7:** Factor C and its Sub factors (C1, C2, and C3) and Sub factors D5 and D6 should address the overall contract as it reflects the offeror's corporate overview.

a. Part I: Experience – Management Approach - SUB FACTOR C1: The offeror shall describe its management philosophy/approach. Provide a list of proposed key personnel and their respective positions with regard to this contract. The offeror shall provide information about experience, education, background, and licenses as well as any additional applicable licenses/certifications, in order to demonstrate the ability of personnel to comply with the requirements of the solicitation. The offeror shall demonstrate experience-providing PAS for at least 24 months of the last 36 months of experience.

(1) Explain management techniques the offeror will use to ensure satisfactory performance of all required services throughout the life of the contract. Discuss the offeror's specific management techniques, tools and practices to ensure the quality and timeliness of services. Explain the offeror's understanding of the type of services provided and the necessary qualifications of contract personnel. If partnering with another contractor, state the capacity in which this partner will serve in the management of this contract.

(2) If the offeror does not have the requisite experience, or within the last 36 months, in providing patient appointment services, then provide a plan that fully describes how the offeror will obtain the necessary management skills and resources needed to provide the required services.

b. Geographic capabilities - SUB FACTOR C2: To include the geographic capabilities: Present the offeror's experience, as a company, in providing patient appointing services within the United States (including Alaska and Hawaii) for both military and/or civilian facilities. List sites where the offeror has provided services and types of services. Provide the offeror's overall work and experience with similar requirements. If the offeror does not possess experience in providing these services at multiple locations, provide a plan that explains how the offeror intends to acquire these resources.

c. Scope of appointing services (centralized and/or decentralized) -SUB FACTOR C3: Describe the offeror's experience to provide services from a centralized location i.e. call center or from decentralized - multiple locations within one or more military treatment facility(ies) – or both, combination of centralized and decentralized. Describe the types of services the offeror provides. If the offeror does not possess experience in providing centralized and/or decentralized appointing services, provide a plan that describes how the offeror intends to acquire the necessary resources.

d. Part II: Technical Capabilities: Factor D – Describe the offeror's technical capabilities as they embrace the two sub factors below.

(1) Staffing Plan – SUB FACTOR D5 – key personnel and training plan. Explain the methods to be used to recruit appointing personnel to include key personnel. Explain the offeror's capability to recruit personnel required by task orders for all varied locations and range of services. Describe the offeror's recruitment and staffing plan that

demonstrates how the offeror will maintain full coverage throughout the life of each task order. Describe the offeror's hiring plan. Describe how quickly the offeror can replace personnel and train them to be functional. Describe procedures/methods to be used to cover unscheduled absences. Describe the offeror's plan and company policy to retain employees and/or subcontractors with minimum turnover. Explain training programs to be provided to new employees. Describe the offeror's internal training plan.

(2) Customer Service and Satisfaction of Appointing Services Plan – SUB FACTOR D6- Provide the offeror's plan that describes how the offeror can ensure customer satisfaction and measure it also. Provide an explanation of the offeror's plan and/or methodology of assuring high customer satisfaction, not only with the beneficiaries who call for appointments, but the MTF staff they deal with on a day-to-day basis. Include in the plan the processes/actions/measurements the offeror will use to ensure high customer satisfaction. Describe how the offeror will monitor, measure and/or analyze to ensure continuing improvement in customer satisfaction/relations. Type and frequency of customer relations training the offeror will engage i.e. face to face, telephone etiquette, conflict resolution type training. Describe the offeror's approach, i.e. will it be internal or will the offeror bring in external customer relations training. Describe if the offeror envisions a "train the trainer" with quarterly or annual refresher training or what the offeror's plan will be.

8. Upon completion of each oral presentation, the government will caucus privately to discuss the offeror's presentation and to formulate clarification questions, if any.

9. Following the government caucus, any clarification or communication will be verbally addressed to the offeror's presenter(s) who must provide answers orally at that time.

10. The oral presentation shall not include any pricing information or issues; however, the government reserves the right to obtain clarification on any pricing issues if the offeror's oral presentation does not coincide with the price proposal.

(End of Notice)

Replace in 52.212-1 (c ):

( c) Replace Period of acceptance of offers with "The offeror agrees to hold the price in its offer firm for 180 days from the date specified for receipt of offers or date of final proposal revisions, whichever is later."

(End of Notice)

Paragraphs 52.212-1(d), (e), (h), (i) are deleted.

(End of Notices)

Add to 52.212-1:

(k): **SPECIAL DELIVERY MAIL.**

a. Offerors are cautioned that there is no special United States Postal Services (USPS) mail delivery directly to Building 4197, such as USPS Express Mail, etc. All USPS mail is delivered to a different location at Fort Sam Houston, and then distributed to Building 4197. Offers should be sent in sufficient time to ensure arrival at Building 4197 by the specified date and time. Offerors should consider the additional time for the mail distribution process to ensure timely delivery.

b. United Parcel Service and Federal Express both deliver directly to Building 4197.

(End of Notice)

(l) Partnering/Teaming Opportunities: The Office of the Associate Director for Small Business (OADSB) for the U.S. Army Medical Command is assembling a list of small and large business concerns interested in Partnering/Teaming Opportunities. If interested contact the OADSB at <http://sb.amedd.army.mil/contacts.cfm> or by telephone at (210) 221-4267 or FAX (210) 221-4126. Business concerns shall provide their company name, point of contact, business size, and address and telephone number. The list will be disseminated to all interested vendors.

(End of Notice)

(m) List of Attachments for 52.212-1

Past Performance Evaluation References PPER Attachment.doc

Past Performance Evaluation Questionnaire PPEQ Attachment.doc

Task Order 1 = BRAGG BRAGG PWS.doc

CHCS Confidentiality and Password Protocol Statement	BRAGG Attachment 1.doc
Sample Appointing Criteria and Business Rules	BRAGG Attachment 2.doc
Historical Specialty Appointment Call Volumes	BRAGG Attachment 3.doc
BRAGG Wage Determination	BRAGG Attachment 4.doc
CLIN Pricing for BRAGG	BRAGG Attachment 5.doc
BRAGG Equivalent Rates	BRAGG Attachment 6.doc

Task Order 2 = POPE POPE PWS.doc

Sample Appointing Criteria and Business Rules	POPE Attachment 1.doc
Sample of Orientation Training	POPE Attachment 2.doc
CHCS Confidentiality and Password Protocol Statement	POPE Attachment 3.doc
Appointing and Telephone Call Volumes	POPE Attachment 4.doc
POPE Wage Determination	POPE Attachment 5.doc
CLIN Pricing for POPE	POPE Attachment 6.doc
POPE Equivalent Rates	POPE Attachment 7.doc

Task Order 3 = Lee LEE PWS **DELETED**

Target Architecture for MTF LANs	LEE Attachment 1.pdf <b>DELETED</b>
Sample Appointing Criteria and Business Rules	LEE Attachment 2.doc <b>DELETED</b>
Sample Training Topics and Hours	LEE Attachment 3.doc <b>DELETED</b>
CHCS Confidentiality and Password Protocol Statement	LEE Attachment 4.doc <b>DELETED</b>
Historical Specialty Appointment Call Volumes	LEE Attachment 5.doc <b>DELETED</b>
LEE Wage Determination	LEE Attachment 6.doc <b>DELETED</b>
CLIN Pricing for LEE	LEE Attachment 7.doc <b>DELETED</b>
LEE Equivalent Rates	LEE Attachment 8.doc <b>DELETED</b>

Task Order 4 = NHGL NHGL PWS.doc

NHGL Information Systems	NHGL Attachment 1.doc
NHGL Command Business Principles	NHGL Attachment 2.doc

NHGL Training Topics and Hours  
 NHGL Info Sys User Confidentiality  
 Historical Contractor Appts Transactions  
 NHGL Wage Determination  
 CLIN Pricing for NHGL  
 NHGL Equivalent Rates

NHGL Attachment 3.doc  
 NHGL Attachment 4.doc  
 NHGL Attachment 5.doc  
 NHGL Attachment 6.doc  
 NHGL Attachment 7.doc  
 NHGL Attachment 8.doc

#### Task Order 5 = Puget

#### PUGET PWS.doc

PUGET Family Practice Appt Criteria  
 PUGET Pediatrics Appt Criteria  
 PUGET Well Child Clinic Appt Criteria  
 PUGET Pediatrics Specialty Clinic Appt Criteria  
 PUGET Refer to ER Criteria  
 PUGET AOP Guidelines  
 PUGET Population and Enrollment Summary  
 PUGET Total Calls  
 PUGET Appt Trans  
 PUGET Phone Listing Appting  
 PUGET Wage Determination  
 PUGET CLIN Pricing  
 PUGET Equivalent Rates

PUGET Attachment 1a.doc  
 PUGET Attachment 1b.xls  
 PUGET Attachment 1c.xls  
 PUGET Attachment 1d.xls  
 PUGET Attachment 1e.xls  
 PUGET Attachment 1f.doc  
 PUGET Attachment 2.xls  
 PUGET Attachment 3.xls  
 PUGET Attachment 4.xls  
 PUGET Attachment 5.doc  
 PUGET Attachment 6.doc  
 PUGET Attachment 7.doc  
 PUGET Attachment 8.doc

#### Task Order 6 = Tidewater

#### TIDEWATER PWS1.doc

Sample Appointing Criteria and Business Rules  
**Training Topics and Hours**  
 CHCS Confidentiality and Password Protocol Statement  
**Historical Specialty Appointment Call Volumes**  
 TIDEWATER Wage Determination  
 CLIN Pricing for TIDEWATER  
 TIDEWATER Equivalent Rates

TIDEWATER Attachment 1.doc  
**TIDEWATER Attachment 2a.doc**  
 TIDEWATER Attachment 3.doc  
**TIDEWATER Attachment 4a.doc**  
 TIDEWATER Attachment 5.doc  
 TIDEWATER Attachment 6.doc  
 TIDEWATER Attachment 7.doc

#### Task Order 7 = WPAFB

#### WPAFB PWS.doc

WPAFB Appointment Guidelines  
 WPAFB Systems Access Request  
 Historical Contractor Appointment Trans Data  
 WPAFB Wage Determination  
 CLIN Pricing for WPAFB  
 WPAFB Equivalent Rates

WPAFB Attachment 1.doc  
 WPAFB Attachment 2.doc  
 WPAFB Attachment 3.doc  
 WPAFB Attachment 4.doc  
 WPAFB Attachment 5.doc  
 WPAFB Attachment 6.doc

(End of Notice)

(End of Addendum to 52.212-1)

ADDENDUM TO 52.212-2 EVAL**Addendum to 52.212-2 EVALUATION - COMMERCIAL ITEMS**

Paragraph 52.212-2(a) and (b), replace with the following:

(a) 1. Multiple Award Task Order (MATO) contracts. The government intends to award multiple fixed-price, indefinite-delivery indefinite-quantity task order contracts resulting from this solicitation. To be considered for award, an offeror must have presented an acceptable subcontracting plan (Factor B). Awards will be made to the responsible offerors whose proposals conform to the solicitation and are most advantageous to the government, price and other factors considered. This will be determined by assessing trade-offs between Price (Factor E) and non-price factors (performance risk (Factor A), subcontracting plan (Factor B), experience (Factor C), and technical capabilities (Factor D)). In analyzing the trade-offs, the government desires to strike the most advantageous balance between all factors/sub factors and price.

2. Task Order Awards. After award of the MATO contracts, task orders included in this solicitation may be awarded based on this initial competition. Each task order will be evaluated to determine the best value to the government based on a trade-off between price and technical capabilities (Transition Plan (Factor D3) and IM/IT and Telephony Plan (Factor D4)). Task order awards will be made without discussions unless determined necessary by the Contracting Officer.

3. It is possible that some offerors may receive a contract award, but not an award of a task order.

4. As part of the responsibility determination required by FAR Part 9, financial statements submitted with proposals will be evaluated to determine if the offeror has adequate financial resources to perform the contract, or the ability to obtain such resources.

5. The following factors and subfactors shall be used to evaluate offers for MATO contract awards: (Written = W and Oral = O)

Factor A. Present/Past Performance (W)

Factor B. Subcontract Plan (W)

Factor C. Experience (O)

Subfactor C1. Management Approach (O)

Subfactor C2. Geographic Capabilities (O)

Subfactor C3. Scope of Appointing Services

(Centralized and/or Decentralized (O)

Factor D. Technical Capabilities (O&W)

Subfactor D1. Quality Control Plan (W)

Subfactor D2. Continuity of Service Plan (W)

Subfactor D3. Transition Plan (W)

Subfactor D4. IM/IT and Telephony Plan (W)

Subfactor D5. Staffing Plan (O)

Subfactor D6. Customer Service and

Satisfaction of Appointing Services

Plan (O)

Factor E. Task Order Pricing (W)

6. Relative importance of evaluation factors for MATO contract awards: Factors A, C, and E are equal in importance. Within Factor C, all subfactors are of equal importance. Factors A, C and E, when combined, are equal in importance to Factor D. Within Factor D, all subfactors are of equal importance. Factor B is the least important factor. Factors A, B, C, and D, when combined, are significantly more important than Factor E, Pricing.

7. Relative importance of evaluation factors for Task Order awards 1-7 **(TO # 3 for Fort Lee is Deleted)**: Only sub factors D3 and D4 and price will be considered. Sub factors D3 and D4 are equal in importance and when combined, are more important than price.

8. All factors must receive a rating of at least Satisfactory to be considered for award for the basic contract and also task orders.

#### 9. EVALUATIONS:

Definitions of performance risk ratings for Present/Past Performance are at Attachment 1 to this addendum. Adjectival Rating Scale for Experience and Technical Capabilities (with proposal risk incorporated into ratings) is at Attachment 2 of this addendum. Adjectival Rating Scale for Subcontracting Plan is at Attachment 3 of this addendum.

FACTOR A: Present and Past Performance. Evaluation of present and past performance will be a subjective assessment based on consideration of all relevant facts and circumstances. It will include a performance risk assessment based on the following:

- Commitment to Customer Service
- Currency of Information
- Relevancy of Information
- General Trends in Contract Performance
- Compliance with Previous Subcontracting Plans

The government may use information from its own files, databases such as PPIMS and PPIRS, references provided by the offeror at **PPER Attachment** or from the **PPEQ Attachments** returned to the Contracting Officer or from any other source it deems appropriate. These adjectival ratings will be considered when determining performance risk. The government may survey references listed in **PPER Attachment and PPEQ Attachment**, to verify information provided and may survey other customers known to the government, and other references that may have useful and relevant information. Information may also be considered regarding any significant subcontractors, and key personnel records. If an offeror does not have past and present performance data relating to this solicitation, the proposed key personnel's performance data may be used as part of the entire evaluation factor. Subcontractor and Teaming (Partnership and Joint Venture Partners') past performance information will be treated the same as any prime contractor's past performance information. The proposals must clearly show that the affiliate or other company will have meaningful involvement in the performance of the contract and that it will be involved in the contract effort or share management with the offeror. There must be an indication in the offeror's proposal that the prime contractor intends to use its workforce, management, facilities, or other resources in performing this contract. If neither the offeror nor the proposed key personnel have a record of relevant past performance or information on past performance is not available, the offeror's lack of past performance will be evaluated as an unknown risk, having no favorable or unfavorable impact on the evaluation. The offeror will be given a neutral rating for this factor.

The currency and relevancy of the information and general trends in contractor's performance will be considered. The risk factor for the age of the performance being evaluated will be assessed such that performance on older contracts receives higher risk assessment than performance on more recent (past 3 years) contracts.

If adverse past performance information is obtained, the person providing the information may be contacted to obtain further information about the circumstances surrounding the situation. If this information adversely impacts an offeror's proposal, the offeror will be given an opportunity to address unfavorable reports of past performance if it has not had a previous opportunity to respond. The offeror's response, or lack thereof, will be taken into consideration.

An evaluation will be conducted for each offeror on his/her performance under existing and prior contracts for similar patient appointment services. The evaluation will take into account past performance information regarding predecessor companies, key personnel who have relevant experience, or subcontractors that will perform major or

critical aspects of the requirement when such information is relevant to the instant acquisition. Performance information will be used for both responsibility determination and as an evaluation factor for award. The Government will focus on information to assess performance risk that demonstrates quality of performance relative to the size and complexity of the procurement under consideration. Both independent data and data provided by offerors in their proposals will be used to evaluate offer's past performance.

Offeror's past performance will be evaluated for compliance with FAR clause 52.219-9 Alt II, Small Business Subcontracting Plan. Non-compliance will increase performance risk. The evaluation shall include the past performance of offerors in complying with subcontracting plan goals for small disadvantaged businesses (SDB) concerns (FAR 19.7), monetary targets for SDB participation (FAR 19.1202), and notifications submitted under FAR 19.1202-4.

Factor B: Subcontracting Plan. Evaluated to see if the Plan meets the requirements of FAR 52.219-9 and the subcontracting goals.

Factor C: Experience.

Sub Factor C1: Management Approach

Sub factor C2: Geographic Capabilities

Sub factor C3: Scope of Appointing Services (centralized and/or decentralized)

Factor C. Based on evaluations of the three sub factors, an overall rating will be assigned to Factor C.

Sub factor C1. The offeror's management approach will be evaluated to determine: the offeror's understanding of the organization and logistics of the management and type of services and personnel required by this solicitation; if the proposed management techniques, tools and practices will ensure quality services throughout the life of the contract; and to determine if the offeror has the requisite experience or a viable plan that fully describes how the offeror will obtain the necessary management skills and resources needed to provide the required services.

Sub factor C2. The extent of offeror's experience in providing PAS in various geographic locations or feasibility of the plan to acquire necessary resources will be evaluated. Emphasis will be on experience in providing services for MTFs.

Sub factor C3. The extent of offeror's experience in providing PAS in from a centralized location, decentralized locations, or a combination of centralized and decentralized locations will be evaluated. If the offeror does not have the requisite experience, the services the offeror does provide and/or the feasibility of the proposed plan to provide these services will be evaluated.

Factor D. Technical Capabilities. Based on evaluations of the six sub factors, an overall rating will be assigned to Factor D.

Written Presentations - D1, D2, D3, and D4.

Sub factor D1. Contractor Quality Control Plan. The offeror's quality control plan will be evaluated for the extent to which it meets the government's performance and quality requirements as stated in PWS. The offeror's methodology for identifying, resolving, and preventing quality assurance problems will be evaluated to demonstrate the offeror's capability in detecting deficiencies which adversely affect contract compliance and contract performance; the corrective steps or methods taken to resolve the issue; and proactive methods taken to prevent quality related problems. The offeror's Plan will be evaluated on how the offeror ensures documentation; how the records are maintained; and what type of reporting is utilized for quality related problems to demonstrate the offeror's level of understanding and commitment to quality control.

Sub factor D2. Continuity of Service Plan. The offeror's Continuity of Service Plan will be evaluated to determine if it meets the government's performance and telephone standards, as stated in PWS. The offeror's plan will be evaluated as to the soundness of the methodology used for supporting current, special, and emergency operations and for providing PAS. In addition the "systems down" plan will be evaluated for the acceptability and feasibility of the Plan for non-operational situations. The Plan for extreme weather conditions will be evaluated for feasibility of the approach and to ensure the offeror demonstrates the level of understanding to ensure PAS is provided. The Plan will be evaluated as to the feasibility and reasonableness of scheduled safety and emergency-training exercises and Service Provider performance of PAS.

Sub factor D3. Transition Plan. The offeror's Transition Plan will be evaluated to ensure the offeror's understanding of the criticality of a successful transition from the incumbent, i.e., managed care support contractors, to the offeror, and the soundness of the offeror's methodology to meet the government's requirements. The pre-performance activities, outlined, i.e., hiring and training of personnel, and acquisition and storage of supplies and equipment, etc., will be evaluated to reflect the offeror's commitment to ensuring service will be provided on the required performance date. The milestone chart and the proposed implementation plan will be evaluated to demonstrate the offeror's understanding of critical events and also strategy required to meet the government's requirements. The acceleration plan will be evaluated as to the feasibility and reasonableness of meeting the government requirement in an accelerated mode.

Sub factor D4. IM/IT and Telephony Plan – The offeror's IM/IT and Telephony Plan will be evaluated to ensure the offeror's understanding of implementing the MTF's requirements for each task order. The offeror's plan will be evaluated as to the soundness of the methodology demonstrated in utilizing or installing telephony. The offeror's plan will be evaluated as to the methodology and utilization of the IM/IT and telephony technical specifications and descriptions to interface with CHCS and government operations for PAS. The offeror's solutions and advantages and disadvantages of the IM/IT and Telephony Plan will be evaluated to demonstrate the offeror's understanding of the requirement and also feasibility of the solution provided.

The plan description for interfacing to CHCS will be evaluated for acceptability. The description and technical specifications of the telephony will be evaluated as to acceptability. The methodology described by the offeror for technical specifications will be evaluated for soundness and technical acceptability. The advantages and disadvantages will be evaluated as to the understanding of the offer's commitment to ensure performance standards to meet the government's requirements.

#### Factor D. Technical Capabilities (Oral Presentations D5 and D6)

##### Sub factor D5. Staffing Plan – key personnel and training plan.

The offeror's methods of recruitment and capability to recruit personnel, including key personnel, required by task orders for all varied locations and range of services will be evaluated to ensure an understanding of the requirements. The offeror's plan and company policy to retain employees and/or subcontractors with minimum turnover and capability to maintain full coverage throughout the life of each task order will be evaluated. The offeror's plan to quickly replace and train personnel to be functional will be evaluated. Training program for new employees and the offeror's internal training plan will be evaluated. Procedures/methods to be used to cover unscheduled absences will be evaluated.

Sub factor D6. Customer Service and Satisfaction of Appointing Services Plan (CSSASP). The offeror's CSSASP will be evaluated to ensure the offeror's understanding of the role of high customer satisfaction (TRICARE beneficiary and MTF staff) and demonstrates how to measure satisfaction. The plan will be evaluated to ensure that processes/actions/measurements the offeror developed relate to a measurable high customer satisfaction program. The CSSASP will be evaluated regarding how the offeror plans to monitor and train personnel to ensure high customer satisfaction in PAS.

#### Factor E: Price - Task Order Pricing.

**NOTE 1:** These task orders to be used for evaluation purposes. The government intends to award these task orders after award of the basic contract(s).

The offeror shall price ALL task orders for evaluation. Pricing will include the base year and option years for the task orders. As future requirements are identified and funded, task orders will be competed/awarded as stated in the Ordering Procedures in the Addendum to 52.212-4.

Proposed pricing for each task order will be evaluated for both price realism and price reasonableness. Price realism means the prices in the offeror's proposal: (1) are realistic for the work to be performed; (2) reflect a clear understanding of the requirements; and (3) are consistent with the various elements of the offeror's technical proposal. Price analysis will be used to evaluate reasonableness, which represents a price that does not exceed that which would be incurred by a prudent person in the conduct of competitive business.

To be considered for award of a contract, proposed pricing for each of the initial task orders must be considered realistic and reasonable.

An offeror's proposal whose pricing is determined realistic and reasonable for a particular task order, may not offer the best value to the government for that task order, and therefore would not receive award of the task order, but could receive a contract award for future task orders.

(b) Options. The Government will evaluate offers for award of contract purposes by adding the total prices for all options to the total prices for the basic requirements for all task orders. The Government will evaluate offers for award of a task order by adding the total price for all options to the total price for the basic requirement for that task order. The Government may determine that an offer is unacceptable if the option prices are significantly unbalanced. Evaluation of options shall not obligate the Government to exercise the option(s).  
(End of Notice)

#### **Attachment 1- Performance Risk used to evaluate Factor A.**

**PERFORMANCE RISK** analysis provides insight into an offeror's probability of successful performance if awarded a contract based on the offeror's performance record on recent, relevant, and similar contract efforts.

**LOW RISK** - Based on the offeror's past performance record, essentially no doubt exists that the offeror will successfully perform the required effort.

**NEUTRAL** - No relevant performance record is identifiable upon which to base a meaningful performance risk predication. A search was unable to identify any relevant past performance information for the offeror or key team members/subcontractors or their key personnel. This is neither a negative nor a positive assessment.

**MODERATE RISK** - Based on the offeror's past performance record, some doubt exists that the offeror will successfully perform the required effort.

**HIGH RISK** - Based on the offeror's past performance record, extreme doubt exists that the offeror will successfully perform the required effort.

#### **Attachment 2 – Adjectival Ratings:**

**RATING SCALE FOR EXPERIENCE AND TECHNICAL CAPABILITIES** (with proposal risk incorporated into the ratings)

The following scale will be used to evaluate Factors and/or associated sub factors: C (C1, C2, and C3); D (D1, D2, D3, D4, D5, and D6).

**EXCELLENT** - Proposal strengths demonstrate an excellent understanding of requirements and new or proven approach that significantly exceeds performance or capability requirements and standards. Any proposal weaknesses have minimal/no potential to cause disruption of schedule, increase in cost, or degradation of performance. The proposal has a high probability of meeting the requirements with little risk to the government.

**GOOD** - Proposal strengths demonstrate a good understanding of requirements and approach that exceeds performance or capability standards. The proposal has a good probability of meeting the requirements. Any proposal weaknesses has little potential to cause disruption of schedule, increase in cost, or degradation of performance. Normal contractor effort and normal Government monitoring will probably minimize any difficulties/risk.

**SATISFACTORY** - Proposal demonstrates acceptable understanding of requirements and approach that meets performance or capability requirements and standards. Few or no strengths. The proposal has an acceptable probability of meeting the requirements. Approach has weaknesses that can potentially cause some disruption of schedule, increase in cost, or degradation of performance. However, special contractor emphasis and close Government monitoring will probably minimize difficulties/risk.

**MARGINAL** - Proposal demonstrates limited understanding of requirements and approach that only marginally meets performance or capability standards necessary for minimal contract performance. Proposal as presented includes minor omissions or demonstrates a misunderstanding of the requirement that may be corrected or resolved through discussions without a complete revision of the proposal. Approach has weaknesses that have the potential to cause risk of serious disruption of schedule, increase in cost, or degradation of performance even with special contractor emphasis and close Government monitoring.

**UNSATISFACTORY** - Fails to meet performance or capability standards or requirements. Proposal as presented includes major omissions or misunderstanding and has inadequate detail to assure the evaluators that the offeror has an understanding of the requirements. Proposal represents unacceptable risk and cannot meet the requirements without major revisions.

**Attachment 3 – Adjectival Rating for Factor B, Subcontracting Plan**

**SATISFACTORY** – Plan meets the requirements of FAR 52.219-9 and the subcontracting goals.

**UNSATISFACTORY** – Plan does not meet the requirements of FAR 52.219-2 and/or the subcontracting goals.

(End of Notice)

(End of Addendum to 52.212-2)

(End of Summary of Changes)